Learner manager manual
Introduction to Search

Helping you support young people as they progress through their learning and enabling them to achieve positive outcomes.

UCAS
Progress

LEARNER MANAGER MANUAL

UCAS Progress works with education providers and local authorities to support young people aged 13 to 19 as they make choices about their learning pathways. UCAS Progress spans academic courses through to vocational courses and training opportunities. It is for all learners irrespective of destination.

There are two components – Search and Apply – available at **www.ucasprogress.com**.

Search. With Search young people can research learning opportunities irrespective of local boundaries. With localised start points, it offers searching and map views based on location and distance the learner is willing to travel.

Apply. A single online application system, Apply enables young people to apply for learning opportunities, either within or outside their current provider. Teachers and advisers have a simple and efficient means of managing applications and admissions, plus reporting to support tracking, analysis and provision planning.

This manual is part of a series of role-based manuals and guides designed to help you get the most out of using UCAS Progress.

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1.0 INTRODUCTION TO UCAS PROGRESS SEARCH

1.1 What is Search?
UCAS Progress Search is an online directory through which young people can find courses and learning opportunities available in their area. Your local network of IAG advisers, your council representatives or your local authority promote this resource to learners.

1.2 What is a Learner Manager?
A Learner Manager is the person with responsibility for creating and managing learner accounts. A Learner Manager has the ability, where permissions are granted, to view learners at multiple and individual providers.

Learner Managers can:

- view learners at the provider(s)
- search for learners at the provider(s)
- create learners at the provider(s)
- edit learners at the provider(s)
- delete learners at the provider(s).

1.3 What is the purpose of the administration site?
The administration area provides tools to create and manage learners at individual providers or across multiple providers within one site.

1.4 How will you receive your login details?
All user accounts will be set up either by your local authority representative or by a dedicated user manager within your provider.

Your username will be set up as your email address in the first instance and to verify your account you will receive a system generated verification email from UCAS Progress.

Within the email you will be requested to click the verification hyperlink and will be prompted to choose a password. Ensure that you choose a memorable password to allow successful repeat access to your account.

To change your username or password, see section 3.

2.0 LOGGING IN AND OUT

2.1 Logging in
From the UCAS Progress homepage go to the top right-hand corner and enter your username and password. This will take you to your own individual administration site homepage.

2.2 Resetting your password
If you have forgotten your password there is a 'Forgotten your password?' link to the right of the log in boxes.

2.3 Logging out
When you are ready to finish your session you can log off by clicking the 'Log off' button at the top right-hand corner of the screen.

3.0 MANAGING YOUR ACCOUNT

3.1 Accessing your account
Click 'My Account' on the UCAS Progress administration homepage. On this page you can edit your personal details, username and password.

3.2 Editing personal details
In this section you can change your first name, last name, email address and telephone number. When you have finished the updates click 'Save'. Keep your personal details up to date so that we can contact you if you forget your log in details.

3.3 Editing your username
In this section you can change your username. The username must be between six and 256 characters and may contain letters, numbers or a few select characters (@.-_). You can change your username to something that is more memorable so that you are less likely to forget it. When you have finished your updates click 'Save'.

When you change your username you will be logged out of the site. You will need to log back in with your new username to continue using the site.

3.4   Editing your password.
To change your password select the 'Password' tab and enter your current password, then your new password, and then confirm that new password. Your password must be between six and 20 characters and contain at least one letter and one symbol or number. When you have finished your updates click 'Save'.

4.0   MANAGING YOUR DASHBOARD

Your dashboard enables you to have an overview of your role and highlights areas you may want to have a look at. For example as a learner manager you can see detailed information about your learners such as those that are locked out or never logged in, those with incomplete profiles, applications etc. You can see these by clicking on the red hyperlinks.

From here you can see a total number of learners allocated to you as a learner manager.

This section will show how many learners have, never logged into the site or activated their account. You can also see the number of learners who have locked themselves out.

From here you are able to start to indentify learners who may need additional help or support in making their application, through the learners with incomplete profiles or with no applications.
But also see learners where activities are required by you as a learner manager.
And see activities of those learners who have already submitted applications.

5.0   CREATING AND MANAGING LEARNER ACCOUNTS

5.1   Creating a new learner
The steps below describe how create a new learner using the learner template. These steps are the best to use when there are only a few individual learners to add. For a number of new learner accounts to create, use the bulk import section of this guide. (section 7)

a.   Click the 'Learners' tab along the top menu bar.

b.   Click 'Create Learner'.

c. You will now need to fill in the key information for the new learner. First fill in their username and password. The username field is mandatory and must be between six and 127 characters and can contain letters, numbers or certain other characters (i.e. @._-).The password field is also mandatory and must be between six and 20 characters and contain at least one letter and one symbol or number.

Please note that the learner will be prompted to change their password upon first login.

d. You will now need to fill in the key information for the new learner, including the learner's first name, last name, date of birth and the academic year that they are currently in. Then select from the drop down list of providers' that the learner is currently attending. You also have the option to add an email address for a learner if you wish to add one.

e. The profile section of this page is for those learners who may be submitting applications though UCAS Progress Apply, for Search only learners leave these fields marked as 'Use provider default'..

f. To add address details, the ULN, CCIS or UPN number for the learner and the gender and ethnicity details do so in the additional information section of the page.

g. Once you have added all the information click 'Save' or 'Create learner and add another'.

5.2 Managing your learners

You can manage your learner by using the steps below:-

a. Click the 'Learners' tab in the top menu bar.

b. You will see a list of all learners linked with your provider/providers, including their username, their first and last names and email addresses. From here you will be able to reset their passwords, unlock them if they have locked themselves out, and also delete learners.

c. To access a learner account to edit their information, click on the name. This will display their key information, profile statements and additional information.

6.0 MANAGING LEARNERS AT MULTIPLE PROVIDERS

(This is information for users who operate in a role across multiple providers. There are two methods of creating a new learner; these are described in 5.1 and 5.2. There are also two methods for managing your learners; these are described in 5.3 and 5.4.

6.1 Creating learners through the 'Providers' tab.

You can access learner details through the 'Providers' tab by clicking on the provider tab along the top menu.

a. To add a learner at a particular provider click on the learner hyperlink for that provider and a list of learners will be displayed.

b. Click 'Create learner'.

c. You will now need to fill in the key information for the new learner. Firstly fill in their username and password. The username field is mandatory and must be between six and 127 characters and can contain letters, numbers or a select few characters (i.e. @._-). The password field is also mandatory and must be between six and 20 characters and contain at least one letter and one symbol or number.

Please note that the learner will be prompted to change their password upon first login.

d. You will now need to fill in the remaining key information for the new learner, including the learner's first name, last name and email address, and the academic year that they are currently in. Then select from the providers' drop down list to indicate where the learner is currently attending.

e. The profile section of this page is for those learners who may be submitting applications though UCAS Progress Apply, for Search only learners leave these fields marked as 'Use provider default'.

f. To add in address details, the ULN, CCIS or UPN number for the learner do so in the additional information section of the page.

g. Once you have added all the information then click 'Save' or 'Create learner and add another'

6.2 Creating learners through the 'Learners' tab

a. Click on the 'Learners' tab along the top menu bar.

b. Click 'Create learner'.

c. Now follow steps 6.1 e - h as set out above.

6.3 Managing your learners through the 'Providers' tab
    a. You can access learner details by click on the 'Providers' tab along the top menu bar.
    b. You will see a list of all of providers where you are responsible for learners.
    c. To access learners at a particular provider, click on the hyperlink for that provider.
    d. To locate the learner that you wish to manage you can either search for the learner using the search box and specifying the academic year or alternatively scroll through the list of learners.
    e. You will see a list of all learners linked with that provider, including their username, their first and last names and email addresses. From here you will be able to reset their passwords, unlock them if they have locked themselves out, and also delete learners.
    f. To access a learner account to edit their information, click on their name. This will display their key information, profile statements and additional information

6.4 Managing your learners through the 'Learners' tab
    a. Click the 'Learners' tab along the top menu bar.
    b. You will then see a list of learners and their usernames, their first names and e-mail addresses. From here you will be able to reset their passwords, unlock them if they have locked themselves out and also delete learners.
    c. Now follow steps 5.3 d-e as set out above.

7.0 INTRODUCTION TO LEARNER IMPORT TOOL

The Import function can be used to import your learners into UCAS Progress and automatically generate usernames and passwords enabling them to access their account and save favourites. The import function should be used to import a number of learners at the same time. The learner import function is available to all Learner Managers.

7.1 Accessing the learner template
To upload learner data into UCAS Progress you will need to populate the template provided. To access and download the template, follow these steps:
   a. Click on the learners tab from the administration area. This will display a list of learners already added to your provider, along with their username, last name, first name and email address.
    b. Click the 'Import learners' button. This will display any previous imports that you have carried out and the status of these imports, download a blank template and also the ability to import the learners into UCAS Progress Search.
    c. Select 'Download learner import template', to display a blank template.
    d. Add the learner data into the spreadsheet ensuring all mandatory fields are completed and save as a Microsoft Excel (.xls) document

7.2 Importing learners
    a. Click on the learners tab from the administration area. This will display a list of learners already added to your provider, along with their username, last name, first name and email address.
    b. Click on the 'Import learners' button. This will display any previous imports that you have carried out and the status of the imports, download a blank template and also the ability to import the learners into UCAS Progress Search.
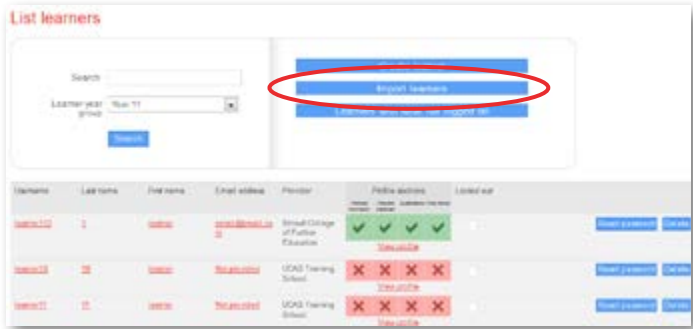
    c. Click the Browse button to locate the spreadsheet containing the learner data and then click 'Open'.
    d. The location of the document will populate in the browse box. Click import and the request will start to process.
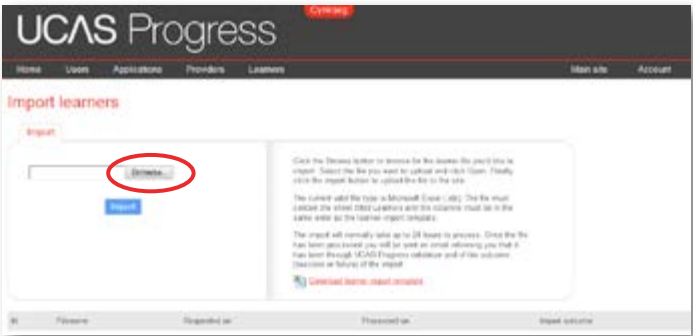
e. Once you have made the request, the import to be processed will display in the list, and will include the date and time it was requested.

f. Once the import has been through the validation process, the person uploading the data will receive an email, the date it was processed and the outcome of the import will then be displayed alongside the request information.

g. If the import was unsuccessful, there will be a description as to why this failed and the ability to view the particular errors by row to re-import the data successfully.

h. If the import was successful then follow steps 2.3 a –d to get a list of all your learners.

The import can take up to 24 hours to process. Once the file has been processed you will be sent an email informing you that it has been through the UCAS Progress validation procedure and the outcome (success or failure) of the import.
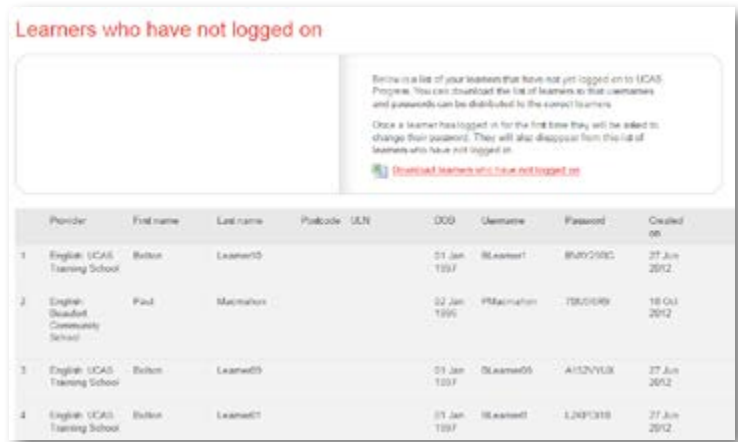
7.3 Viewing learners who have not logged in

Once you have imported the learners into UCAS Progress their passwords and usernames will be automatically generated. The usernames and passwords then need to be distributed to the learners. When a learner first logs in they will be prompted to change their password. You will be able to view and download a list of learners who have not logged in. To view this, follow these steps:

a. Click on the learners tab from the administration area. This will display a list of learners already linked to your provider, along with their username, last name, first name and email address.

b. Click the 'Learners who have not logged in' button to view a list of learners who have yet to access the system.
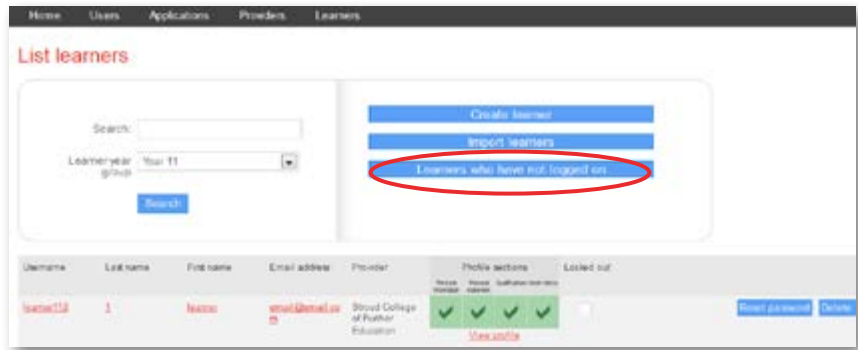
c. From this list you will be able to view the learners' details including their personal details and the username and password that was automatically created, the date that it was created and the provider they are linked with.

d. From this page you can also download an excel spreadsheet of those learners who have not yet logged in.

7.4   Inputting data into the spreadsheet

Where possible all columns should be populated with data, however to ensure the import is successful you need to ensure that all the mandatory fields are completed and where necessary that the format is correct.

UKPRN - The UK Provider Reference Number of the provider you wish to add learners to. This creates a link between the learner and the provider on UCAS Progress. The number has to match exactly to the UKPRN of the provider on UCAS Progress. This is a mandatory field.

Learner year group - The year that the learner is currently in.

First name - The first or given name of the learner. This is a mandatory field.

Last name - The last or family name of the learner. This is a mandatory field.

Email address - The primary email address of the learner; this can be either a school or personal email address.

House name or number - The first line of the learner's address. This is usually their house name or house number.

Street - The second line of address for the learner. This is usually their street name.

Locality - The third line of address for the learner. This is usually a particular neighbourhood, place, or district.

Town - The fourth line of address for the learner. This is usually their town or city.

Postcode - The postcode of the learner's address. This is a mandatory field.

Telephone - The primary telephone number for the learner.

ULN - The Unique Learner Number of the learner.

UPN - The Unique Pupil Number of the learner.

CCIS - The CCIS young person record ID.

Dob - The date of birth of the learner, using the date pattern YYYY-MM-DD.

Gender - The gender of the learner, this should be either Female, Male, Not known or Not specified.

Ethnicity - The ethnic origin of the learner, based on the 2011 census, this should be input in one of the following formats: English / Welsh / Scottish / Northern Irish / British, Not provided, Irish, Gypsy or Irish Traveller, Any other white background, White and Black Caribbean, White and Black African, White and Asian, Any other mixed / multiple ethnic background, Indian, Pakistani, Bangladeshi, Chinese, Any other Asian background, African, Caribbean, Any other Black African /Caribbean background, Arab, Any other ethnic group.

8.0   LINKING TO THE MAIN SITE

Along the top bar there is a link 'Main site' link, which takes you back to the homepage of the learner search.

UCAS Progress Support Team
The Support Team is available to support clients with technical enquiries and system requests relating to existing UCAS Progress products and services.

The Support Team can be contacted on 08714 682 568 Option 1 or at ucasprogresssupport@ucas.ac.uk.

UCAS Progress Training and Implementation Team
The Training and Implementation Team is on-hand to support clients and users with product implementation and training, either by telephone or in face-to-face sessions. In addition to our core programmes, they can devise and deliver programmes to meet your specific requirements.

The Training and Implementation Team can be contacted on 08714 682 568 Option 2 or at ucasprogresstraining@ucas.ac.uk.

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